

## Guide to Enrolling in Benefits – Open Enrollment 2023

Open Enrollment (OE) provides you the opportunity to enroll and/or make changes to your benefit plans for you and your family. This document provides guidance on how to complete your benefit elections through [UCPath](#) online during Open Enrollment for the plan year of 2023.

### Open Enrollment:

- ◆ Starts: **October 27, 2022, at 8 a.m.**
- ◆ Ends: **November 18, 2022, at 5 p.m.**

### Contents:

To jump to one of the following sections, click on the link below:

- ◆ [Web Browser Tips](#)
- ◆ [Log in to UCPath](#)
- ◆ [Open Enrollment Page](#)
- ◆ [Add Dependents to Benefit Plans](#)
- ◆ [How to Submit your Benefit Elections](#)
- ◆ [Review your Open Enrollment Elections](#)
- ◆ [I Have No Changes](#)
- ◆ [OE Coverage Begin & Paycheck Deduction Dates](#)
- ◆ [UCPath Open Enrollment Troubleshooting TipsAppendix](#)

## Guide to Enrolling in Benefits – Open Enrollment 2023

### How to Make Your Open Enrollment Changes

#### Web Browser Tips

- ◆ Use a current version of Safari, Google, Firefox, or Microsoft Edge to enroll during Open Enrollment on UCPath.
- ◆ Disable pop-up blockers **before** you start the enrollment process. Refer to the [Disable Pop-Up Blocker](#) job aid for instructions

#### Log in to UCPath

Log in to [UCPath](#) and locate the Open Enrollment countdown clock at the top of the dashboard and click the **Enroll Now** button.



If prompted, answer the **Security Question** and then click the **Submit** button.

- ◆ The questions/answers are specific to your account and may not be the same as the example shown here
- ◆ You are required to set up security questions and answers to use self-service functionality in UCPath, which includes Open Enrollment. Refer to the [Security Question Setup](#) training simulation for instructions.

A screenshot of the 'SECURITY QUESTION' setup screen. The title 'SECURITY QUESTION' is at the top. Below it, the text reads 'Please confirm your identity by answering the following security question.' A text input field contains the question 'What is your favorite food?' and a series of six dots representing a masked answer. Below the input field is a blue 'Submit' button. In the bottom right corner, there is a pink circular 'Help' button.

## Guide to Enrolling in Benefits – Open Enrollment 2023

### Benefits Enrollment Page

The **Benefits Enrollment** page appears after successfully answering the displayed security question. You can click on [Ask ALEX](#) link to access your virtual benefits counselor.

Under the **Open Enrollment Events** section, click on the **Open** button to begin making your Open Enrollment elections.

- ◆ Note: A spinning circle indicates UCPath is processing your request

### BENEFITS ENROLLMENT

Fernando Jiang

Welcome to the benefits enrollment section.

You and your family now have an opportunity to enroll in benefits based on one of the scenarios listed below :

- You are a new hire with a Period of Initial Eligibility (PIE) to enroll in benefits initially, OR
- You are newly eligible for benefits, OR
- You have a life event that enables you to make enrollment changes, OR
- The annual Open Enrollment period is now open

Scroll down to view the list of your benefit events below. Do you see the **Open** button next to an event? If so, that indicates the event is currently open to you for enrollment. Click on **Open** to begin.

Take advantage of the OE opportunity because your other options are limited to:

**90-day Waiting Period**  
If you miss your initial enrollment period, you may enroll yourself and/or your family member in medical coverage with a 90 day waiting period. Coverage is effective after 90 consecutive calendar days have elapsed. Your premiums may need to be paid on an after-tax basis.

**Open Enrollment**  
Open Enrollment (OE) is the time each year (typically in the Fall) when you can change your medical plan and sign up for other benefits. Shortly before OE opens, UC will launch a dedicated website, [ucal.us/oe](http://ucal.us/oe) to guide you through the process. Most changes you make during OE are effective January 1 of the following year.  
UC Residents and Fellows are eligible for the Flexible Spending Accounts only through UCPath, please visit [www.ucresidentbenefits.com](http://www.ucresidentbenefits.com) for more information.

**Life Event**  
A *life event* provides an opportunity to enroll in, or make changes to, your UC benefits when family status changes occur (marriage, domestic partnership, birth, adoption or divorce) or, in some cases, after you or an eligible family member experience an involuntary loss of non-UC health & welfare coverage. Changes to benefits elections made due to a life event are effective retroactive to the date the life event occurred.

The **Open** button below indicates that you may make benefit elections now. If you recently made Open Enrollment elections and the Open Enrollment period has not ended, you may click on the Submitted button and you will be allowed to submit new elections. You may make changes one time daily through the close of Open Enrollment, then your elections are final. If you encounter an error, need assistance or have additional questions, contact the UCPath Center at 1-855-9UC-PATH (1-855-982-7284).

Need help deciding which benefits are right for you? [Ask ALEX.](#)

### Open Benefit Events

Click the **Open** button to load your benefits enrollment information.

<b>Open Enrollment</b> TRAINER 3	<b>Open</b> >
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## Guide to Enrolling in Benefits – Open Enrollment 2023

### Open Enrollment Page

The **Open Enrollment** page displays the following sections:

- ◆ **Reminders:** Review all the information provided in this section for important benefit plan reminders
- ◆ **Election Summary:** This section shows your current cost per pay period for your benefit choices. As you make your Open Enrollment elections, the **Before Tax** and **After Tax** columns will update to reflect your total costs.
- ◆ **Current Benefits Details:** These tiles represent all of the available benefit plans. The benefit plan tiles will display your selected plan and plan cost. If you are a new employee, tiles will default to **Waive**.
  - Click on the **Edit** button (pencil icon) on each of the benefit plan tiles to make changes to your elections
  - **Note:** Benefit plans without an edit (pencil icon) button are **not** open for changes during Open Enrollment

For this example, click on the **Edit** button (pencil icon) on the **Medical** tile to make changes to this benefit plan.

### OPEN ENROLLMENT

Now is the time to make sure you're enrolled in the right plans for you and your family. To learn more about your choices, click on UCnet.

**Reminders**

**Flexible Spending Accounts:** If you are enrolled in the Health or DepCare Flexible Spending Account (FSA) and want to continue participating next year, you **must** reenroll in these programs during Open Enrollment. If you do not reenroll in the Health FSA, you must have a minimum of \$25 remaining in your account on December 31, 2022 to be able to carry over your balance to the next plan year. The carryover from plan year 2022 to 2023 is limited to \$570.

**Moving from FSA to Health Savings Account:** If you are enrolled in Health FSA in 2022, will have a balance of at least \$25 at the end of the plan year, and plan to enroll in the Health Savings Plan for 2023, UC will create a Limited Health FSA for your carryover balance. Please see UCnet for more information.

**Life and Disability Plans:** You cannot enroll in Life or Disability Plans through the Open Enrollment event in UCPath. However, you can apply for coverage at any time by submitting an application directly to the insurance carriers. Enrollment is not guaranteed, and certain medical conditions may prevent approval. Visit UCnet for more information on how to apply.

**Family Member Eligibility Verification:** If you enroll new family members during Open Enrollment, you are required to verify your family members' eligibility for coverage. You will receive a packet from UnifyHR with instructions on how to complete the verification process. If you do not complete verification, your family members will be disenrolled from benefits.

**Important:** Your current benefit elections are summarized below.

To edit your benefit elections, click on the edit button (pencil icon) in the upper corner of the benefit tile and modify your selection(s).

Once your selections have been completed, select the **Submit** button to finalize your choices.

Your enrollments are not finalized until you Submit all your choices from the Submit Benefit Choices page.

**Election Summary**

This table summarizes estimated costs per pay period for your new benefit choices.

	Before Tax	After Tax	Total	Employer
Costs	0.00	77.24	77.24	115.01
<b>Your Costs</b>	<b>0.00</b>	<b>77.24</b>	<b>77.24</b>	

**Current Benefits Details**

**Medical**

✎

Waive  
New

**Dental**

✎

Delta Dental PPO:Self + Adult (NA)

0.00  
Before Tax

**Vision**

✎

Vision Service Plan (VSP):Self + Adult (NA)

0.00  
Before Tax

## Guide to Enrolling in Benefits – Open Enrollment 2023

In the **Select an Option** section for the medical benefit plan, select your plan or waive coverage.

**Select an Option**  
Here are your available options with your costs per pay period. (Your cost = full benefit cost – UC contribution)

Core Plan Select	UC Health Savings Plan Select	UC Care Plan Select
UC Blue & Gold HMO Select	Kaiser North Selected	Waive Select

[View cost summary](#)

### Add Dependents to Benefit Plans

Use the **Enroll Your Family Members** section to add dependents to the selected plan. The dependents you enter in UCPath appear in the **Dependent** list. You can add or modify dependents during the enrollment process.

Click on the **Add/Review Family Members** button

**Enroll Your Family Members**

The following list displays all individuals you have named as family members. If an individual is missing from this list, use the **Add/Review Dependents** button to add new family members or to determine why a family member has been determined to be ineligible.

The Affordable Care Act (ACA) requires employers to make reasonable efforts to obtain Social Security numbers for employees, spouses /domestic partners, and dependents.

To enroll any of the listed individuals for coverage in this plan, check the box next to the family member's name.

**Dependent**

Samia Y Slaughter - Domestic Partner, EE TaxDep NA

[Add/Review Family Members](#)

On the **Add/Review Dependent** page, select the name of your dependent to view or modify their personal information. To add a dependent, click the **Add a dependent** button.

**ADD/REVIEW DEPENDENT**

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify personal information. To add a dependent or beneficiary, select the 'Add a dependent' button.

Domestic Partner, EE TaxDep NA	Date of Birth: Dependent:	01/01/1988 Yes	>
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[Return to Event Selection](#) [Add a dependent](#)

## Guide to Enrolling in Benefits – Open Enrollment 2023

On the **Dependent Personal Information** page, complete the **Personal Information** section for your dependent(s).

### DEPENDENT PERSONAL INFORMATION

Select Save once you have added your Dependent personal information. This information will go into effect as of Jan 1, 2023. The Affordable Care Act (ACA) requires employers to make reasonable efforts to obtain Social Security number for employees, spouses/domestic partners, and dependents.

#### Personal Information

\* **First Name**

**Middle Name**

\* **Last Name**

**Name Prefix**

**Name Suffix**

\* **Date of Birth**

\* **Gender**

Select an Option

**Social Security Number**

In the **Relationship** section, click the drop-down in **What Relationship do you have with the dependent?** The **Relationship to Employee** section will auto-populate based on your selection.

### Relationship

**What Relationship do you have with this dependent?**

Select an Option

\* **Relationship to Employee**

Select an Option

## Guide to Enrolling in Benefits – Open Enrollment 2023

In the **Address and Telephone** section, you can select the checkboxes to use the **Same Address as Employee** and the **Same Phone as Employee** if the dependent and employee use the same address and phone. Once you complete the **Dependent Personal Information** page, click on the **Save** button.

Address and Telephone

Same Address as Employee

Country United States

Address 300 Lakeside Dr  
Dummy 100  
Oakland, CA 94612

Same Phone as Employee

Phone Phone

\* Denotes required field

Return to Dependent Summary Save

The **Save Confirmation** page confirms the personal information entered for your dependent was successfully saved. Click **OK** button to continue.

SAVE CONFIRMATION

✓ The Save was successful.

OK

You are returned to the **Enroll Your Family Members** section, and the newly entered dependent appears in the **Dependent** list but is **not yet** enrolled in the benefit plan.

To enroll a dependent in this plan, click the check box next to the dependent(s) name.

Enroll Your Family Members

The following list displays all individuals you have named as family members. If an individual is missing from this list, use the **Add/Review Dependents** button to add new family members or to determine why a family member has been determined to be ineligible.

The Affordable Care Act (ACA) requires employers to make reasonable efforts to obtain Social Security numbers for employees, spouses /domestic partners, and dependents.

To enroll any of the listed individuals for coverage in this plan, check the box next to the family member's name.

Dependent

[Redacted] - Domestic Partner, EE TaxDep NA

[Redacted] - Child EE Biological/Adopted NC

Add/Review Family Members

## Guide to Enrolling in Benefits – Open Enrollment 2023

After you complete your elections for the selected benefit plan, you can either:

- ◆ Click the **Save and Continue – Your elections are not complete** button to save your changes and continue to the next screen
  - **Note:** Clicking on **Save and Continue – Your elections are not complete** DOES NOT submit your Open Enrollment elections. This only saves your elections.
- ◆ Click the **Cancel Changes** button to exit this page without saving your changes.

Cancel Changes

Save and Continue – Your elections are not complete

UCPath displays the details for your selection, including the plan, the estimated pay period cost for the benefit election, and the covered dependents.

Click on the **Save Changes** button to submit your changes or click the **Back** button to continue making changes before saving.

### MEDICAL

**Fernando Jiang**

**Your Choice**  
You have chosen Kaiser North with Self + Adult (NA) coverage.

**Your estimated cost per pay period**  
**\$146.16**

**Your Covered Dependents**

Name	Relationship
Samia Y Slaughter	Domestic Partner, EE TaxDep NA

**Notes**  
Once submitted, this choice will take effect January 1. For biweekly employees, deductions will start with your first paycheck in December, with the exception of disability and Flexible Spending Account deductions, which commence with your paycheck in January. For monthly employees, deductions will start with your first paycheck in January, with the exception of disability deductions, which commence with your paycheck in February.

Back
Save Changes

The **Open Enrollment** page appears again. The plan and cost for the benefit plan you selected display on the tile. **Repeat the steps for each benefit plan tile to make your Open Enrollment elections.**

### Election Summary

This table summarizes estimated costs per pay period for your new benefit choices.

	Before Tax	After Tax	Total	Employer
Costs	146.16	77.24	223.40	1,362.62
<b>Your Costs</b>	<b>146.16</b>	<b>77.24</b>	<b>223.40</b>	

### Current Benefits Details

**Medical**

Kaiser North:Self + Adult (NA)  
New

**146.16**  
Before Tax

**Dental**

Delta Dental PPO:Self + Adult (NA)

**0.00**  
Before Tax

**Vision**

Vision Service Plan (VSP):Self + Adult (NA)

**0.00**  
Before Tax

## Guide to Enrolling in Benefits – Open Enrollment 2023

### How to Submit your Benefit Elections

Once you have reviewed each of the benefit plan tiles and have made all your elections, and want to begin the submit process, scroll down to the bottom of the **Open Enrollment** page. Click on the **Save and Continue – Your elections are not complete** button to save your changes and continue to the next screen.

- ◆ **Note:** Clicking on **Save and Continue – Your elections are not complete** DOES NOT submit your Open Enrollment elections. This only saves your elections.

Select the **Submit** button to finalize your choices.

Important: Your enrollment will not be complete until you submit your choices.

**Save and Continue – Your elections are not complete**

The **Submit Benefit Choices** page will appear. Review the **Terms and Conditions**, and click on the checkbox under the **Arbitration** section to accept the Terms and Conditions, as well as the **HIPAA Statement Confirmation**.

**SUBMIT BENEFIT CHOICES**

You have almost completed your enrollment. If you have no further changes, accept the Arbitration statement and Terms and Conditions below, then select the **Submit** button to finalize your benefits choices.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the **Submit** button your benefit choices will be processed.

You may make changes to your elections during Open Enrollment; however, you may submit changes only once per day.

**Terms and Conditions**

Your Social Security number, and that of your enrolled family members, is required for purposes of benefit plan administration, for financial reporting, to verify your identity, and for legally required reporting purposes all in compliance with federal and state laws.

If you are confirmed as eligible for participation in UC-sponsored plans, you are subject to the following terms and conditions:

**ARBITRATION**

With regard to enrollment in a Kaiser Foundation Health Plan (KFHP), I understand that (except for Small Claims Court cases, claims subject to a Medicare appeals procedure or the ERISA claims procedure regulation, and any other claims that cannot be subject to binding arbitration under governing law) any dispute between myself, my heirs, relatives, or other associated parties on the one hand and Kaiser Foundation Health Plan, Inc., any contracted health care providers, administrators, or other associated parties on the other hand, for alleged violation of any duty arising out of or related to membership in KFHP, including any claim for medical or hospital malpractice (a claim that medical services were unnecessary or unauthorized or were improperly, negligently, or incompetently rendered), for premises liability, or relating to the coverage for, or delivery of, services or items, irrespective of legal theory, must be decided by binding arbitration under California law and not by lawsuit or resort to court process, except as applicable law provides for judicial review of arbitration proceedings. I agree to give up our right to a jury trial and accept the use of binding arbitration. I understand that the full arbitration provision is contained in the Evidence of Coverage.

**NOTICE: BY SIGNING THIS CONTRACT YOU ARE AGREEING TO HAVE ANY ISSUE OF MEDICAL MALPRACTICE DECIDED BY NEUTRAL ARBITRATION AND YOU ARE GIVING UP YOUR RIGHT TO A JURY OR COURT TRIAL.**

**BY CHECKING THIS BOX I AM ELECTRONICALLY SIGNING AND ACCEPTING THE ABOVE ARBITRATION TERMS PERTAINING TO KAISER FOUNDATION HEALTH PLANS.**

Click on the following checkboxes:

- ◆ By checking this box I accept the above Terms and Conditions
- ◆ HIPAA Notice of Privacy Practices

By checking this box I accept the above Terms and Conditions

HIPAA Notice of Privacy Practices

By selecting this checkbox, I am electing to receive an electronic HIPAA statement.

Authorizing Electronic

## Guide to Enrolling in Benefits – Open Enrollment 2023

Below the **Authorize Elections** section, continue with one of the following:

- ◆ Click the **Cancel** button to exit this page without saving your changes
- ◆ Click on the **Save and Continue – Your elections are not complete** button to save your changes and continue to the next screen
  - **Note:** Clicking on **Save and Continue – Your elections are not complete** DOES NOT submit your Open Enrollment elections. This only saves your elections.

By checking this box I accept the above Terms and Conditions

**HIPAA Notice of Privacy Practices**

By selecting this checkbox, I am electing to receive an electronic HIPAA statement.

**Authorize Elections**

By submitting your benefit choices you are authorizing the University of California to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

If you select the **Save and Continue – Your elections are not complete** button, the following **Message** page displays. Click **OK** to continue.

**MESSAGE**

Elections can only be submitted once daily during the open enrollment election period. Please review elections before submitting. Any subsequent changes cannot be made until tomorrow. Click OK to proceed.

The **Submit Confirmation** page will inform you that your benefit elections were successfully submitted.

- ◆ **Note:** You will receive a confirmation statement by email within 24-48 hours. Although you submitted your benefit elections, you can still make additional changes. You can submit additional Open Enrollment changes in UCPath **once per day during the Open Enrollment election period.**
- ◆ Click **OK** to return to the Open Enrollment page

**SUBMIT CONFIRMATION**

Your benefit choices have been successfully submitted.  
You will receive a confirmation statement by email (typically within 24 - 48 hours).  
To return to the Benefits Enrollment page, use the **OK** button.

2023 Open Enrollment Survey is located [here](#).

## Guide to Enrolling in Benefits – Open Enrollment 2023

Under the **Open Enrollment Events** section, it will display as **Submitted** until your elections are processed.

- ◆ Your Open Enrollment event reopens the following day at 8 a.m. in case you want to make additional changes. You will receive an **Open Enrollment Submission Statement** via email each time you submit your Open Enrollment elections.
- ◆ You can continue to make and submit your Open Enrollment changes, **once per day**, until November 18, 2022, at 5:00 p.m. PST



The final Open Enrollment **Confirmation Statement** is sent to you via email when UCPATH completes Open Enrollment processing by December 5, 2022.

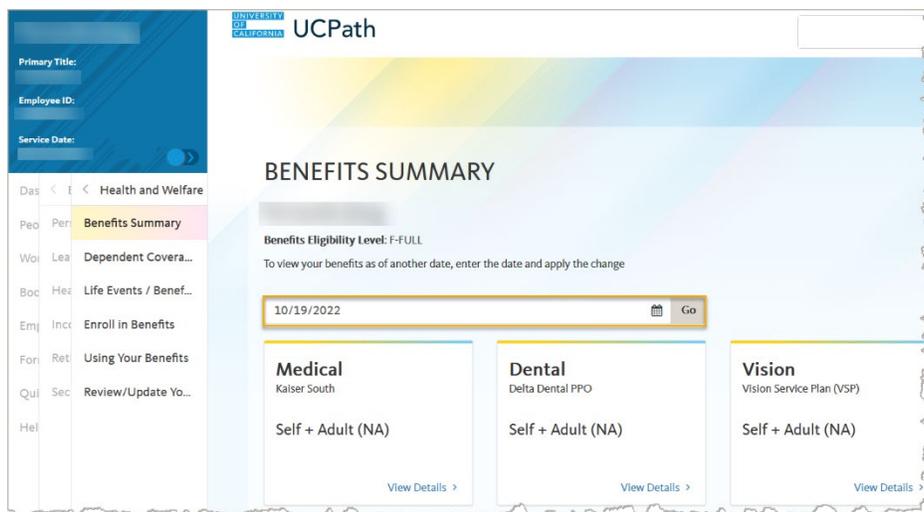
### Review your Open Enrollment Elections

You can review your Open Enrollment elections on your **Open Enrollment Submission Statement** sent via email or on [UCPath](#) on the **Benefits Summary** page **after** your Open Enrollment changes are finalized.

- ◆ **Note:** Your Open Enrollment elections are usually finalized by the next business day after you submit your elections

To see your finalized Open Enrollment elections, log into [UCPath](#). From the **Dashboard**, navigate to **Employee Actions > Health and Welfare > Benefits Summary**. Refer to the [View Benefits Summary](#) training simulation for instructions.

- ◆ **Note:** To view your 2023 elections, use the calendar icon to select a date on or after 1/1/2023.



## Guide to Enrolling in Benefits – Open Enrollment 2023

### I Have No Changes

Open Enrollment is the opportunity for you to review your benefits and make any necessary changes to your benefits elections, but is not required. If you wish to continue the same benefit plans you currently have, no action is required, except for Flexible Spending Accounts (FSAs)

- ◆ If you are enrolled in a Flexible Spending Account (Health FSA and/or the DepCare FSA) and want to continue participating in 2023, you must re-enroll (each calendar year)

**Note:** You can make and submit your Open Enrollment changes, once per day, until November 18, 2022, at 5:00 p.m. PST

### OE Coverage Begin Date & Paycheck Deduction Dates

The following table illustrates the coverage begin date for OE changes and the paycheck on which new benefit rates take effect. Bi-weekly employees pay most benefit costs the month in advance of coverage and monthly employees pay most benefit costs at the start of the coverage month. This means that most new 2023 benefit rates will reflect in a December 2022 paycheck for bi-weekly employees.

Pay Schedule	OE Coverage Begin Date Before OE Finalized*	OE Coverage Begin Date After OE Finalized*	Deduction Begin Date	Paycheck Date
<b>Bi-weekly</b>	12/10/2022	1/1/2023	11/13/2022*	12/7/2022
<b>Monthly</b>	1/1/2023	1/1/2023	12/1/2022*	1/3/2023

\*Bi-weekly: 2023 disability premiums for January coverage and Flexible Spending Account (FSA) contributions will be deducted on the 1/4/2023 paycheck

\*Monthly: Flexible Spending Account (FSA) contributions and disability premiums will be deducted on the 2/1/2023 paycheck

## Guide to Enrolling in Benefits – Open Enrollment 2023

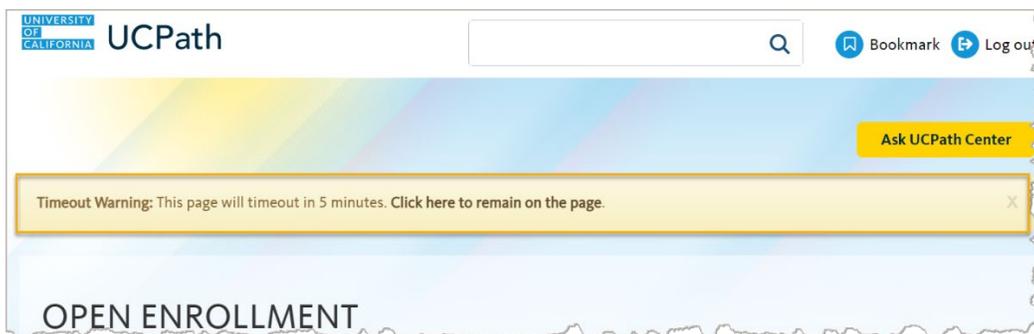
### UCPath Open Enrollment Troubleshooting Tips

If you are unable to move forward in the Open Enrollment pages (for example, the page seems to be 'stuck'), return to the UCPath **Dashboard** and click the **Enroll Here** button.

- ◆ From the **Dashboard**, you can also navigate to **Employee Actions > Health and Welfare > Enroll in Benefits**. This action refreshes the **Enroll in Benefits** transaction. You may or may not lose your data entry; data entry is generally saved, but this may not occur if you were truly 'stuck.'

For security purposes, if there is non-activity while on the Open Enrollment page on UCPath, the system will automatically timeout after 20 minutes. The following warning message will appear five minutes before the default system timeout occurs.

- ◆ If this message occurs while you are making your Open Enrollment elections, click on the text, *Click here to remain on the page*. Otherwise, your session will time out and you will need to go back to the Open Enrollment page by clicking on the Enroll Now button on the UCPath dashboard.



- ◆ Or you may get the UCPath Alert window, if your session is about to expire. Click on **Yes** to reset your session.

